Westridge Elementary PTA Bylaws
August 28, 2024

* Article I — Name

The name of this association is the Westridge Elementary Parent Teacher Association, PTA, hereinafter referred to as "this local PTA", and is located in Littleton, Colorado. This local PTA is organized under the authority of Colorado Congress of Parents and Teachers (Colorado PTA), a branch of the National Congress of Parents and Teachers (National PTA).

* Article II — Purposes[1]

Section 1. **Objectives.** The purpose or purposes (Objects) which the association will hereafter pursue are:

a. To promote the welfare of children and youth in home, school, places of worship and throughout the community.
b. To raise the standards of home life.
c. To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth.
d. To promote the collaboration and engagement of families and educators in the education of children and youth.
e. To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth.
f. To advocate for fiscal responsibility regarding public tax dollars in public education funding.

Section 2. **Awareness.** The purposes of the PTA are promoted through advocacy and education in collaboration with parents, families, teachers, educators, students, and the public; developed through conferences, committees, projects, and programs; and governed and qualified by the basic principles set forth in Article III.

Section 3. **Federal Status.** The association is organized exclusively for the charitable, scientific, literary, or educational purposes within the meaning of Section 501 (c)(3) of the Internal Revenue Code or corresponding section of any future federal tax code (*referred to as Internal Revenue Code*).

* Article III — Principles[1]

The following are basic principles of PTA:

a. The association shall be noncommercial, nonsectarian, and nonpartisan.
b. The association shall work to engage and empower children, families, and educators within schools and communities to provide quality education for all children and youth and shall seek to participate in the decision-making process by influencing school policy and advocating for children's issues,

   recognizing that the legal responsibility to make decisions has been delegated by the people to boards of education, state education authorities, and local education authorities.
c. The association shall work to promote the health and welfare of children and youth, and shall seek to promote collaboration, among families, schools, and the community at large.

d. Commitment to inclusiveness and equity, knowledge of PTA, and professional expertise shall be guiding principles for service in PTA.

*Article IV — Operational Requirements[2]

Section 1. **Net Earnings.** No part of the net earnings of the association shall inure to the benefit of, or be distributable to, its members, directors, trustees, officers, or other private persons except that the association shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article II hereof.

Section 2. **Exempt Activities.** Notwithstanding any other provision of these articles to the contrary, in no event shall the association carry on any other activities which are not permitted to be carried on (i) by an association exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code or (ii) by an association, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code.

Section 3. **Political Activities.** The association or its members in their official capacities shall not, directly, or indirectly, participate or intervene (in any way, including the publishing or distributing of statements) in any political campaign on behalf of, or in opposition to, any candidate for public office, or devote more than an insubstantial part of its activities to attempting to influence legislation by propaganda or otherwise.

Section 4. **Dissolution.** Upon the dissolution of this association, after paying or adequately providing for the debts and obligations of the association, the remaining assets shall be distributed to one or more nonprofit funds, foundations, or associations that have established their tax-exempt status under Section 501(c)(3) of the Internal Revenue Code and whose purposes are in accordance with those of National PTA.

* Article V — Relationship with National PTA and Colorado PTA

Section 1. This local PTA shall be organized and chartered under the authority of the Colorado PTA in the area in which this local PTA functions, in conformity with such rules and regulations, as the Colorado PTA may in its bylaws prescribe. The Colorado PTA shall issue to this local PTA an appropriate charter evidencing the due organization and good standing of this local PTA.

Section 2. This local PTA shall adopt such bylaws for the governance of the association. Such bylaws shall not be in conflict with National PTA bylaws, Colorado PTA bylaws, the Internal Revenue Service (IRS) Code and/or state nonprofit laws and are subject to review by the Colorado PTA Bylaws Committee. Each local unit shall comply with the requirements in the local unit bylaws template as approved by the Colorado PTA Board of Directors.

Section 3. The charter of a local PTA shall be subject to withdrawal and the status of the local PTA shall be subject to termination under the circumstances provided in the Colorado PTA bylaws.

Section 4. This local PTA is obligated, upon withdrawal of its charter by the Colorado PTA:

a. To yield up and surrender all books and records and all assets and property to the Colorado PTA or to such agency as may be designated by the

Colorado PTA, or to another local PTA organized under the authority of the Colorado PTA.

b. To cease and desist from the further use of any name that implies an association with the National PTA or the Colorado PTA or status as a constituent association of the National PTA.
c. To carry out promptly, under the supervision and direction of the Colorado PTA, all proceedings necessary or desirable for the purpose of dissolving this local PTA.

Section 5. Delinquent status — Failure to remit membership dues by the end of the Colorado PTA fiscal year (June 30) shall result in the association being declared "delinquent". Delinquent units will be ineligible for all Colorado PTA sponsored activities, materials, and services until such time as dues are paid. Continued delinquency may result in withdrawal of the charter under the procedure outlined in the Article on Dissolution.

Section 6. Provisional status — The following may constitute cause for a unit to be placed on provisional status:

a. Failure to correct violations within timelines set by the Colorado PTA may result in withdrawal of the charter.
b. Failure to comply with the Internal Revenue Service (IRS) regulations.
c. Violation of the purposes or principles of PTA.
d. Violation of unit, Colorado PTA, or National PTA bylaws.
e. Failure to include required asterisk (*) items in local unit or council bylaws.

Section 7. Good Standing — Colorado PTA requires the following to be a unit in good standing:

a. Remits the state and national portion of the dues and membership reports through the Colorado PTA to reach the state office by dates established by Colorado PTA Board of Directors.
b. Has bylaws approved according to the procedures of Colorado PTA Board of Directors.
c. Purchases directors/officers, liability, and bonding insurance coverage. If insurance is not purchased through Colorado PTA's recommended provider, proof of insurance is required to be submitted to Colorado PTA.
d. Submits a completed officer's list as requested by Colorado PTA.
e. Submits a copy of its annual financial review/audit report.
f. Submits a copy of required IRS tax return (i.e., either Form 990, 990-EZ, or 990-N; as determined by gross receipts in accordance with the IRS regulations).
g. Registers with the Colorado Secretary of State office for the Colorado Charitable Solicitations Act (if required).
h. Three (3) officers of each local unit or designees must attend one (1) position-specific leadership training annually. This requirement may be fulfilled in person (region/council training, conferences) or by completing a National or Colorado PTA e-Learning course.
i. Meets other criteria as may be prescribed by the Colorado PTA Board of Directors, Colorado PTA and National PTA, the Internal Revenue Service (IRS) Code, and/or Colorado State law.

Article VI — Membership and Dues

***Section 1.** Membership Principles

a. Every individual who is a member of this local PTA is, by virtue of that fact, a member of the National PTA and of the Colorado PTA by which this local PTA is chartered and is entitled to all the benefits of such membership.
b. Membership in PTA shall be open, without discrimination, to anyone who believes in and supports the Mission, Purposes, and Principles of National PTA.
c. Each local PTA shall accept members at any time. A planned membership campaign shall be conducted throughout the year.

Section 2. Membership Classification

a. Voting
   *i. Individual – Defined as any individual who supports the purposes of PTA. Each individual shall have one vote.

Section 3. Membership Dues

a. Each member of this local PTA shall pay annual dues which include the portion payable to Colorado PTA (the "state portion") and the portion payable to National PTA (the "national portion"). Dues for the local unit portion shall be determined by the membership at any regular meeting or a special meeting called for that purpose.[3] [4] The state and national portions of the dues paid by each member of this local PTA shall be set aside and remitted to the Colorado PTA according to established procedure.
b. Annual Membership Dues
   *i. Individual – Each individual member shall pay annual dues of eight ($8) dollars.

Article VII — Business Partners

Section 1. **Business Partners** – This local PTA may solicit businesses which are interested in supporting the mission, purposes, and principles of PTA as partners or sponsors. Business partners support this local unit through financial and/or in-kind donations. **Business partners are not members, do not pay membership dues, and do not have voting rights.** The rates and benefits for business partners are determined by this local PTA.

Article VIII — Officers and Election

Section 1. Each officer of this local PTA shall be a member of this local PTA and be at least eighteen (18) years of age.

Section 2. Officers and election:

a. The officers of this association shall be president, one (1) vice president, secretary, and treasurer.

b. Officers shall be elected in the month of March.
c. The vote shall be conducted by ballot and a majority vote shall elect. When

there is but one candidate for any office that election may be held by voice vote.

d. Officers shall assume their official duty June 1 and shall serve for a term of two (2) year(s) or until their successors are elected and assume office.
e. No officer shall serve more than two (2) consecutive terms in the same office.
f. A person who has served in an office for more than one half of a full term shall be deemed to have served a full term in such office.

Section 3. In the president's absence or inability to serve, officers, in their designated order Vice President, Treasurer, Secretary shall perform the duties of the president.

Section 4. Nominating Committee:

a. There shall be a nominating committee composed of three (3) members who shall be elected by the membership of this local PTA at least two (2) months prior to the election of officers.
b. The nominating committee shall:
   i. Elect a chair;
   ii. Nominate at least one (1) eligible person for each office to be filled and report its nominees at the regular membership meeting at least thirty (30) days prior to the election.
c. Additional nominations may be made from the floor at the election meeting.
d. Only those individuals who are current members of any local PTA and who have signified their consent to serve if elected shall be nominated for, or elected to, such office and must become a member of this local PTA at the beginning of their term of office.

Section 5. Vacancy — A vacancy occurring in any office shall be filled for the unexpired term by a majority vote of the board of directors.

Article IX — Duties of Officers

Section 1. The president shall:

a. Preside at all meetings of this local PTA and the board of directors.
b. Serve as an ex-officio member of all committees except the nominating committee.
c. Coordinate the work of the officers and committees of this local PTA in order that the purposes may be promoted.
d. Appoint standing and special committee chairs with the approval of the board of directors, with the exception of the nominating committee chair.
e. Appoint special committees, as needed, with the approval of the board of directors.
f. Sign all contracts.
g. May appoint a parliamentarian, with the approval of the board of directors
h. Perform such other duties as may be provided for by these bylaws, prescribed by the parliamentary authority, directed by the board of directors

Section 2. The vice president(s) shall:

a. Serve as aide to the president.
b. Perform the duties of the president in the president's absence or inability to serve.
c. Perform such other duties as may be provided for by these bylaws, prescribed by the parliamentary authority, directed by the president,or the board of directors

Section 3. The secretary shall:

a. Record the minutes of all meetings of this local PTA and board of directors.
b. Be prepared to read any correspondence and the records of any meetings during the current or previous fiscal year.
c. File and maintain all records in accordance with document retention requirements.
d. Have a current approved copy of the bylaws.
e. Maintain a current membership list.
f. Perform such other duties as may be provided for by these bylaws, prescribed by the parliamentary authority, directed by the president or the board of directors.

Section 4. The treasurer shall:

a. Have custody of the funds of this local PTA.
b. Maintain a full account of the funds of this local PTA.
c. Disburse funds of this PTA only in accordance with the budget adopted by the membership or according to an appropriation approved by the membership.
d. Be responsible for a full and accurate account of the receipts and disbursements in the books belonging to this local PTA.
e. Provide a financial report to the board of directors and the membership at each meeting.
f. Provide an annual report of the financial condition of the association to the membership at the meeting following the financial review/audit.
g. Be one of the authorized signers on all PTA accounts. **(See Article on Fiscal Year and Financial Responsibilities.)**
h. Submit the books annually for a financial review/audit by an auditor or a financial review committee selected by the board of directors. A signer on the checking account may not be the auditor or a member of the financial review committee. The financial review must be completed within thirty (30) days of the close of the fiscal year. A report of the completed financial review will be presented to the PTA for adoption at the first meeting following the completion of the review, and a copy will be submitted to the Colorado PTA.
i. Perform such other duties as may be provided for by these bylaws, prescribed by the parliamentary authority, directed by the president, or the board of directors.

Article X — Board of Directors

***Section 1.** The affairs of this local PTA**;** shall be managed by the board of directors in the intervals between local PTA regular membership meetings. The board of directors shall take no action in conflict with these bylaws, or any action taken by the membership.

***Section 2.** Each board member shall be a member of this local PTA. All board members must be at least eighteen (18) years of age.

***Section 3.** A local PTA member shall not serve as a voting member of the local unit's board of directors while serving as a paid employee of, or under contract to, that unit.

Section 4. The members of the board shall be:

a. Elected officers.
b. Appointed members including the principal.

Section 5. Committee chairs and appointed members shall be appointed or reappointed at the beginning of each administration for a term that corresponds to that of the officers. Committee chairs and appointed members may serve unlimited terms in the same position at the discretion of the president, with approval of the board of directors.

Section 6. Duties of the board shall be to:

a. Carry out necessary business between regular membership meetings.
b. Create standing and special committees.
c. Present a report at the regular membership meetings of this local PTA.
d. Approve an annual budget prepared by the finance committee, to be adopted by the membership.

***Section 7.** The board shall choose a process by which to perform the required annual financial review. Acceptable processes include either an internal financial review (performed by a minimum of two (2) people who were not signers on the PTA accounts, are not immediate family, and do not reside in the same household as the signers on the account during the fiscal year being examined/reviewed) **OR** an external review performed by a CPA. A report of the completed review will be presented for adoption at the first board meeting following the completion of the financial review or audit, and a copy will be submitted to the Colorado PTA.

***Section 8.** If any member of the board of directors shall at any time cease to meet the qualifications or fulfill the duties of the position, that person may be removed from the board with a two-thirds (2/3) vote by the board of directors, or a majority vote with previous notice, or a majority vote of the entire membership.

***Section 9.** Regular meetings of the board of directors shall be held with the date and time to be fixed by the board at its first meeting of the year.

***Section 10.** Special meetings of the board of directors may be called by the president or when requested by two (2) board members upon a minimum office (5) days' written notice to each member of the board.

***Section 11.** At all meetings of the board of directors, a majority of the members of the board shall constitute a quorum for the transaction of business.

***Section 12.** Upon the expiration of the term of office or when individuals cease to hold the position that entitles them to be a member of the board, they shall automatically cease to be a member of the board and shall be relieved of all duties and responsibilities incident to such membership. All records, books, and other materials pertaining to the position shall be turned over to the president and all funds pertaining to the position shall be returned to the treasurer within fourteen (14) days.

Article XI — Committees

***Section 1.** Only members of this local PTA shall be eligible to serve in any elected or appointed positions.

Section 2. The standing committees of this local PTA are:

*a. Nominating Committee
*b. Finance Committee
*c. Membership Committee

Section 3. The board of directors may create such standing committees and special committees, as it may deem necessary to promote the purposes of PTA and carry on the work of this local PTA.

Section 4. Committee chairs shall be appointed or reappointed at the beginning of each administration for a term that corresponds to that of the officers. Committee chairs may serve unlimited terms in the same position.

Section 5. The chair of each committee shall present a plan of work to the board of directors for approval. No committee work shall be undertaken without the consent of the board of directors.

Section 6. The chair of each standing committee shall appoint the members of that committee with the approval of the president.

Section 7. Standing and special committees shall report to the board of directors.

Article XII — Regular Membership Meetings

***Section 1.** Regular membership meetings of this local PTA shall be held at least eight (8) times per year; dates to be set by the board of directors at the first regular membership meeting of the year, unless otherwise provided by this local PTA or the board of directors. A minimum of five (5)days' notice shall be given to the membership of any change of date.

***Section 2.** Special meetings of this local PTA may be called by the president, a majority of the board of directors, or by five (5) members upon a minimum of five (5) days' notice having been given.

***Section 3.** The election meeting shall be held in the month of March

***Section 4.** Five (5) members shall constitute a quorum for the transaction of business in any meeting of this local PTA.

***Section 5.** There shall be no proxy voting.

*Article XII — Electronic Meetings, Communications, and Voting

Section 1. This local unit PTA board of directors; committees and subcommittees; and regular and special membership meetings shall be authorized to meet by any means of communication by which all persons participating in the meeting may hear each other during the meeting. A member participating in a meeting by this means is deemed to be present in person at the meeting.

Section 2. Unless members indicate otherwise to the local unit PTA president, all communications required in these bylaws, including meeting notices, may be sent electronically.

Section 3. Electronic meetings are considered special meetings for purposes of notice and quorum.

Section 4. Electronic voting is allowed in accordance with procedures established by the Colorado PTA Board of Directors.

Article XIII— Council Membership

***Section 1.** Jefferson County Council — each member unit shall be entitled to representation on the voting body by its president or alternate, and by three (3) delegates or alternates selected by the unit according to its own procedure. All delegates and alternates shall be members of the member unit.

Section 2. Delegate Selection. Delegates and their alternates shall be appointed by the board of directors at the first meeting of the new fiscal year.
of the board of directors;

Article XIV — PTA Conventions

***Section 1.** Colorado PTA convention — This local PTA shall be entitled to be represented by five (5) delegates or alternates for the first hundred (100) members or fraction thereof plus one (1) delegate or alternate for each additional one hundred (100) members or fraction thereof in good standing as shown on the books of the Colorado PTA as of the second dues reporting date of the fiscal year. Units not reporting members by the second dues reporting date will be authorized delegates upon receipt of dues payment.

a. All representatives to the Colorado PTA convention must be members of this local PTA.
b. Delegates and their alternates shall be appointed by the president. Once the delegates and alternates have been selected according to your local unit bylaws, the president has the authority to fill any vacancies on the list. In the event, the president does not attend convention; the president may designate another officer to approve any on-site substitutions.

Section 2. National PTA convention — This local PTA shall submit names of delegates to attend the National PTA Convention to the Colorado PTA office. Delegates shall attend National PTA Convention as delegates of the Colorado PTA, but nametag and registration will include the local PTA name.

a. All representatives to the National PTA convention must be members of this local PTA.
b. Delegates and their alternates shall be appointed by the president.

Article XV — Fiscal Year and Financial Responsibilities

Section 1. The fiscal year of this local PTA shall begin on July 1 and end on the following June 30.

Section 2. This local PTA shall keep such permanent books of account and records as shall be sufficient to establish the items of gross income, receipts, and disbursements of the association, including, specifically, the number of its members, the dues collected from its members, and the amounts of dues remitted to the Colorado PTA. Such books of account and records shall at all reasonable times be open to inspection by an authorized representative of the Colorado PTA or, where directed by the committee on state and national relationships, by a duly authorized representative of the National PTA.

Section 3. This association must file the current IRS Form 990, 990-EZ, or 990-N by the date required by the IRS for filing. This local unit must also submit proof of filing to the Colorado PTA office.

Section 4. Two (2) officers shall sign all PTA checks. All accounts held at financial institutions require two (2) signatures for all disbursements and withdrawals and require a minimum of three (3) authorized signers. All signers must be at least eighteen (18) years of age. Signers cannot have disbursement authority over the

school/school district funds, nor shall two (2) signatories reside in the same household or be immediate family.

Section 5. All methods of disbursements and withdrawals from PTA accounts must be authorized in the approved budget (or amendments made to the budget) and require the use of documentation which includes two (2) authorized signers.

* Article XVI — Parliamentary Authority

The rules contained in the current edition of Robert's Rules of Order, Newly Revised shall govern this local PTA in all cases in which they are applicable and in which they are not in conflict with these bylaws, National PTA bylaws, Colorado PTA bylaws, the Internal Revenue Service (IRS) Code and/or state nonprofit laws, or any special rules of order Colorado PTA may adopt.

* Article XVII — Amendments

Section 1. These bylaws may be amended at any regular or special meeting called for that purpose by a two-thirds (2/3) vote of members present and voting, a quorum having been established, provided the amendments have been provided to the membership at least thirty (30) days prior to the meeting.

Section 2. The board of directors, by a majority vote, may authorize the committee on bylaws to submit a revised set of bylaws as a substitute for the existing bylaws.

Section 3. Submission of amendments or revised bylaws for approval by the Colorado PTA shall be in accordance with the bylaws or regulations of the Colorado PTA.

Section 4. The adoption of an amendment to any required provisions of the National PTA and the Colorado PTA shall serve automatically and without the requirement of further action by the constituent association (this local PTA). The constituent association (this local unit) shall promptly incorporate such amendments in their respective bylaws.

*Article XVIII — Dissolution

Section 1. Elected officers serving at the time of the dissolution are legally responsible for proper dissolution procedures. All legal records must be kept in accordance with the record retention schedule. Officers serving at the time of dissolution will respond to an IRS audit even if they are no longer associated with the PTA, the school, or live in the state.

Section 2. This local PTA, under the supervision and direction of the Colorado PTA, shall dissolve its affairs in the following manner:

a. Notice, by electronic and hard copy letter, of pending dissolution must be given to the Colorado PTA at least forty-five (45) days before the meeting of the membership is held to discuss and vote on the dissolution issue. Enclosed with the letter of notification shall be a copy of the minutes from the meeting in which a discussion of possible dissolution took place.
b. A meeting of the membership must be held to vote on the dissolution issue. All members of the unit must be notified in writing at least thirty (30) days before the meeting. All communications, including meeting notices, may be sent electronically. A representative of the Colorado PTA, designated by the Colorado PTA Vice President of Field Service, must be present. A minimum

of fifteen (15) minutes must be provided for the Colorado PTA representative to speak prior to the dissolution vote. A two-thirds (2/3) ballot vote of members present and voting, a quorum being present, must carry this intent of dissolution. Dissolution is effective immediately if the vote is in the affirmative.

c. Upon dissolution, the Colorado PTA office must receive within thirty (30) days of the dissolution vote:
   (1) An electronic and hard copy letter giving details of the vote to dissolve, and a detailed accounting of the disbursements of funds.
   (2) A copy of the final IRS Form 990, 990-EZ, or 990-N.
   (3) Local unit charter, all Colorado PTA and National PTA materials, current bylaws, standing rules, all minutes, budget, and all financial books of account and records including the closing bank statement.

d. Disbursement of funds and assets must be approved by a two-thirds (2/3) vote of members present and voting at the dissolution meeting. All funds and assets must be distributed within two (2) weeks according to the Article on Basic Purposes.

e. Upon the dissolution of this association, after paying or adequately providing for the debts and obligations of the association, the remaining assets shall be distributed to one or more nonprofit funds, foundations, or associations that have established their tax-exempt status under Section 501 (c)(3) of the Internal Revenue Code and whose mission, purposes and principles are in accordance with those of National PTA.

f. Proof of the 501 (c)(3) status of any organization receiving any PTA funds must be received by Colorado PTA.

g. No PTA money may be used by a new or existing school association or deposited in school accounts.

[1] National PTA Bylaws Article IV, Section 3.
[2] National PTA Bylaws Article XIV.
[3] See the Article on Amendments. Dues changes are required to have previous notice and a two-thirds (2/3) vote.
[4] If the individual breakdown of dues (national, state, and/or local) is included in bylaws be aware that any change to such dues, at any level, will result in the submission of bylaws for approval.

Signature/Date Page

DRAFTING NOTE: Check the appropriate box below and submit for review by e-mail to office@copta.org. Please submit bylaws electronically in WORD.

CHECK THE BOX THAT IS APPLICABLE:

☒ A COMPLETE SET OF BYLAWS (USING THE MOST CURRENT TEMPLATE FROM COLORADO PTA) FOR APPROVAL EVERY THREE YEARS. **ADOPTED BY THE MEMBERSHIP ON _8/28/2024__. (DATE)**

☐ AMENDMENTS ONLY (SUBMITTED BETWEEN THREE YEAR APPROVAL – JUST AMENDMENTS ARE SENT TO COLORADO PTA). **ADOPTED BY THE MEMBERSHIP ON _____. (DATE)**

☐ A **COMPLETELY REVISED** SET OF BYLAWS SUBMITTED **BETWEEN** THREE YEAR APPROVAL. **ADOPTED BY THE MEMBERSHIP ON _____. (DATE)**

DRAFTING NOTE: Place cursor inside of text box and make a X.

__Julie Valencia_____ _____8/28/24_____
Reviewed by President (Name) Date

__Julei Valencia - President _____ ____9/4/24_____
Person Submitting – (Name and Title/Position) Date